

Managing Content for Results: StratML, the International Standard



About Owen Ambur

Owen Ambur Founder & Chair AIIM StratML Committee





Webinar Objectives

- Vision of the StratML standard
- Core elements of Part 1, Strategic Plans
- Elements of Part 2, Performance Plans
- Purposes of the standard
 - Networking
 - Content Management
 - Strategic Alignment
- Rendering strategic plans in StratML format using Web-based XForms form
- Required Tools, Apps & Services



Introduction

- Strategy Markup Language (StratML)
 - XML vocabulary & schema
 - Strategic & performance plans & reports
 - Part 1, Strategic Plans
 - ISO 17469-1
 - Part 2, Performance Plans & Reports
 - ANS/AIIM 22:2011
 - Part 3, Additional Elements
 - AIIM best practice



Vision

- A worldwide web of intentions, stakeholders, and results
 - Intentions What are the longer-term goals & nearterm objectives?
 - Stakeholders Who is trying to do it and for the benefit of whom?
 - Results How do we know if progress is being made and when success has been achieved?



StratML Core Elements

- 1) Mission
- 2) Vision
- 3) Value(s)
- 4) Goal(s)
- 5) Objective(s)
- 6) Stakeholder(s)
- 7) Organization(s)

INTERNATIONAL STANDARD

ISO 17469-1

First edition

Document management — Strategy markup language (StratML) —

Part 1: StratML core elements

Gestion de documents — Langage de marquage de stratégie

Partie 1: Éléments principaux du StratML



Reference number ISO 17469-1:2015(E)

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Mission, Vision & Values

Mission

A brief description of the basic purpose of the organization.

Vision

 A concise and inspirational statement implicitly relating an organization's purpose to its values, thus motivating its actions toward a future state it strives to achieve.

Value

 A principle that is important and helps to define the essential character of the organization.



Goals & Objectives

Goal

A relatively broad statement of intended results over multiple years

Objective

 A target level of results within a single resource allocation and performance execution cycle



Stakeholders & Organizations

Stakeholder

 An individual whose interests may be affected by or whose action may be required in order to achieve a goal or objective.

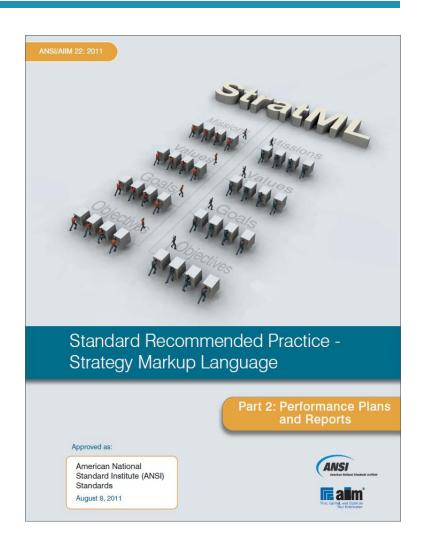
Organization

 The legal or logical entity to which the plan or report applies.



Performance Plan Elements

- Stakeholder Roles
 - Performers
- Performance Indicators
 - Quantitative
 - Qualitative





StratML Purposes

- Updating & maintenance of plans
- Stakeholder feedback
- Strategic alignment
 - Content linked to objectives
- Discovery of performance partners
 - Common & complementary objectives
- Virtuous cycle of continuously improving performance ... on a worldwide scale



Social Networking Services

- Facebook
 - What we look like
 - Photos
 - Videos
- LinkedIn
 - Whom we "know"
- Twitter
 - What we happen to be doing right now

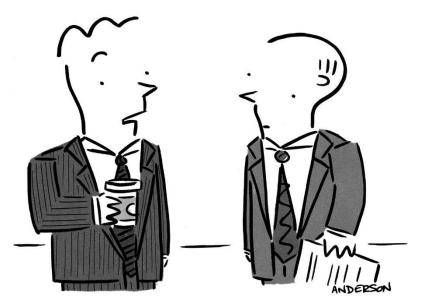




Content Management

- Management = Metadata
- Strategic Alignment = Linkages

@ MARK ANDERSON, WWW.ANDERTOONS.COM



"You ever have one of those days where you just don't feel like aligning?"



Strategic Alignment

- Goals & Objectives in StratML Format
- Identifiers Populated with GUIDs
- GUIDs Referenced as Content Metadata
- StratML-Enabled CMSs



GUID Referencing

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<?xml version="1.0" encoding="UTF-8"?>
<StrategicPlan xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns="http://www.stratml.net" xsi:schemaLocation="http://www.stratml.net"</pre>
http://xml.gov/stratml/references/StrategicPlan.xsd">
   <Name>Serving the Congress and the Nation: STRATEGIC PLAN 2014 - 2019
   <Description>As a legislative branch agency, we are exempt from many laws that apply to the executive branch agencies. However, we generally hold ourselves to the spirit of many of these
       laws, including the Government Performance and Results Act of 1993 (GPRA) and the GPRA Modernization Act of 2010. This strategic plan provides what we consider to be information
       equivalent to that supplied by executive branch agencies in their GPRA-required strategic plans.</br>
   <OtherInformation/>

    StrategicPlanCore>

     - <Organization>
           <Name>United States Government Accountability Office</Name>
           <Acronym>GAO</Acronym>
          <Identifier>_c090eb6a-92df-11df-b499-6b157a64ea2a</Identifier>
           <Description>GAO is an independent, nonpartisan professional services agency in the legislative branch of the federal government. Commonly known as the audit and investigative arm
             of the Congress or the "congressional watchdog," we examine how taxpayer dollars are spent and advise law-makers and agency heads on ways to make government work
             better.</Description>
          <Stakeholder>
              <Name>Gene L. Dodaro</Name>
              <Description>Comptroller General of the United States/Description>
           </Stakeholder>
         - <Stakeholder>
              <Name>Congress</Name>
              <Description/>
           </Stakeholder>

    <Stakeholder>

              <Name>Taxpayers</Name>
              <Description/>
           </Stakeholder>
         - <Stakeholder>
              <Name>American People</Name>
              <Description/>
           </Stakeholder>
       </Organization>
```



Query/Discovery via GUIDs



_c090eb6a-92df-11df-b499-6b157a64ea2a



Q

About 25 results (0.48 seconds)

GAO Fiscal Year 2014 Performance Plan GAO is unique in ... xml.fido.gov/stratml/carmel/GAOPP2014.xml •

Rectangular Snip

Government Accounability Office GAO _c090eb6a-92df-11df-b499-6b157a64ea2a The Government Accountability Office (GAO) is the audit, evaluation, and ...

Performance Indicator - portal

www.hyperbase.com/library/hyperform/stratml/asset/.../gao-13-518.xml ▼ Jun 27, 2013 - United States Government Accountability Office GAO _c090eb6a-92df-11df-b499-6b157a64ea2a J. Christopher Mihm GAO Contact ...



XSL Styling

Table of contents

Vision Mission Value

Name of value

- a.: Transparency
- i.: Action Plan
- ii.: Data Publication
- iii.: Transparency Initiatives
- iv.: Actions and Milestones
- v.: Records Management Website
- vi.: FOIA Requests and Website
- vii.: Organizational Web Page viii.: Declassification Webpage
- b.: Participation
 - i.: Public Engagement Websites
 - ii.: Feedback Mechanisms
- c.: Collaboration
 - i.: Collaboration Platforms
 - ii.: Collaboration Websites
- iii.: Collaboration Incentives
- d.: Flagship Initiative
 - i.: Overview
 ii.: Explanation
 - v.: Partners
 - iv.: Performance Measures
 - v.: Sustenance and Continuous Improvement
- e.: Public and Agency Involvement
 - i.: Public Involvement
 - ii.: Agency Involvement

StrategicPlan

Model Open Government Plan

This is a model open government plan incorporating the requirements set forth in the attachment to OMB M-10-06 at http://www.whitehouse.gov/sites/default/files/microsites/ogi-directive.pdf A description of your agency's plan may be provided here.

Other information about this plan may be provided here.

Source:

Insert the URL indicating the location of this plan on the agency's Web site.

Start: 2010-01-01 End: 2012-12-31 Publication Date: 2009-12-24

Submitter: Organization:

Given name: First Name: Enter the name of the agency

Acronym: Enter acronym

Surname: Last Name

Description: A description of your agency may be provided here.

Phone Number: 999-

Stakeholder(s):

Email Address:
EmailAddress@agency.gov () Name of stakeholder for this organization: Description of stakeholder. (Repeat this element as many

times as necessary to identify key stakeholders.)

Vision

Name

The future state envisioned as a result of this plan is ...

Mission

This plan establishes a public roadmap detailing how our agency will incorporate the principles of the President's January 21, 2009, Memorandum on Transparency and Open Government into the core mission objectives of our agency.





PDF

Model Open Government Plan

Rectangular Snip

This is a model open government plan incorporating the requirements set forth in the attachment to OMB M-10-06 at http://www.whitehouse.gov/sites/default/files/microsites/ogi-directive.pdf A description of your agency's plan may be provided here.

Other information about this plan may be provided here.

Organization

Name: Enter the name of the agency

Acronym: Enter acronym

A description of your agency may be provided here.

STAKEHOLDER

Name of stakeholder for this organization

Description of stakeholder. (Repeat this element as many times as necessary to identify

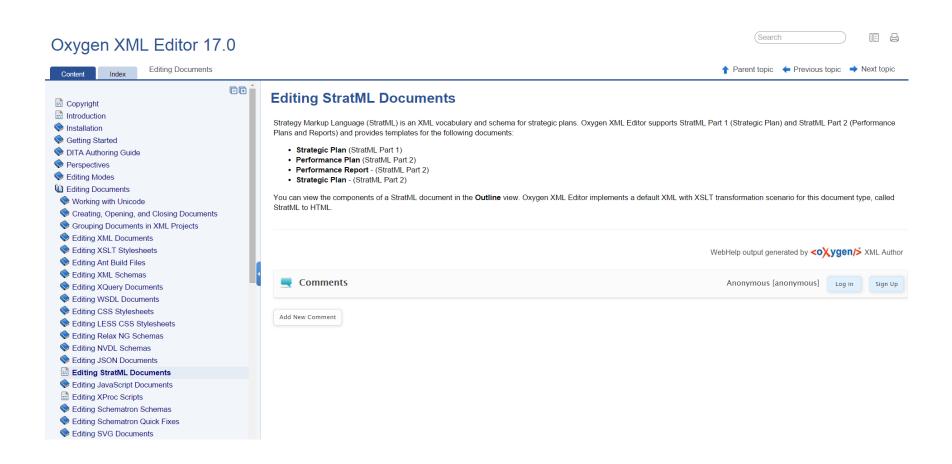


Rendering Plans in StratML

- Any XML-enabled tool
 - oXygen
 - http://www.oxygenxml.com/
 - My InfoPath forms
 - http://xml.fido.gov/stratml/index.htm#Forms
 - Joe Carmel's XForms form
 - http://xmldatasets.net/XF2/stratmlisoxform.xml
 - Etc.
 - http://xml.fido.gov/stratml/index.htm#Forms



oXygen XML Editor



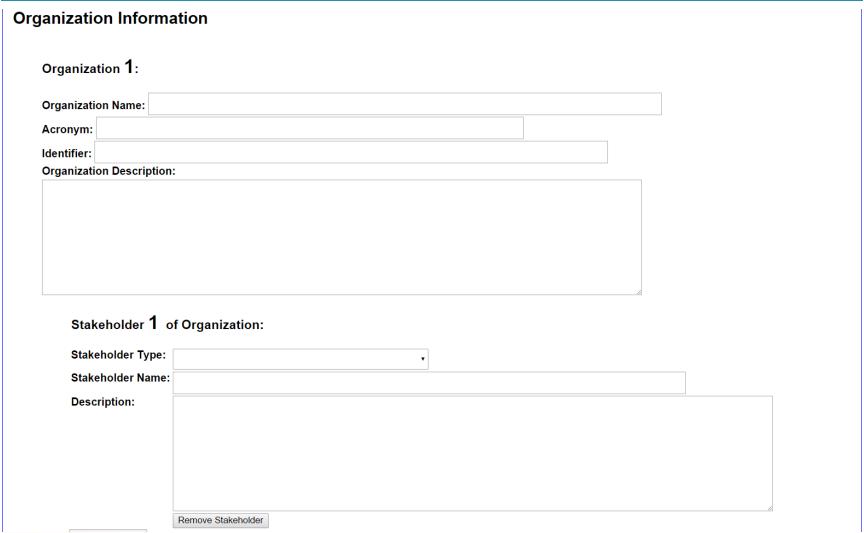


Plan Information

	I all I I C)1111 - I	SO Versi	on		
	izational strategies and c	directions XSLTForms	XForms Spec Al	<u>oout</u>		
This XML Form (XF	orm) provides an easy way to cre	eate and edit StratM	L files.			
Save the XForm you	u create here to your hard drive a	and reimport it until	ou're ready to publish.			
After you post the fil	le on your website, re-import the	file here and catalo	the file for others to find.			
	StratML URL:		Local StratML File: Choose File No file chosen Import StratML From File			
n Information	_					
Name of Plan:	Insert the name of the plan here					
Source of Plan (e.g., URL):	Provide the URL for	the authorita	tive source of the	plan here	Link	
Description of Plan:				•		ı
If desired, the plan ma	y be briefly described her	re.				
Start Date of Plan:						4
Start Date of Plan: End Date of Plan:						



Organization Information





Vision, Mission & Values

Vision		
Vision Identifier:		
Vision Description:		
Mission		
Mission Identifier:		
Mission Description:		
Values (1)		
Value 1:		
Name:		
Description:		
aiim ®	23 Copy	right © AIIM All rights reserved.

Goals

o .1		
Goal 1:		
Goal Name:		
Description:		
Goal Identifier: Sequence Indicator:	1	
Other Information:		
	Stakeholder 1 of Goal 1:	



Objectives





Submitter Information & Saving

Submitter Information

Given Name:	Surname:
Email Address:	
Telephone Number:	
XMI XMI	+XSI HTMI Reset



StratML Collection



Government Agencies - <u>U.S. Federal</u> - <u>Small</u> | <u>State & Local</u> | <u>International</u>

<u>Quasi-Governmental Organizations</u> | <u>Nonprofit Organizations</u> | <u>Educational Institutions</u> | <u>Other Plans</u>

<u>Back to StratML Home Page</u>

U.S. Federal Agency Plans

- 1. Unleashing the Power of Data to Serve the American People (UPDSAP), Dr. DJ Patil, Deputy U.S. CTO for Data Policy and Chief Data Scientist Plain XML text | Styled
- 2. U.S. Open Data Action Plan (USODAP) Plain XML text | Styled
- 3. Project Open Data (POD) Plain XML text | Styled
- 4. Project Interoperability (PI) Plain XML text | Styled
- 5. Recovery Accountability and Transparency Board (RATB) Plain XML text | Styled
- 6. Office of Science and Technology Policy (OSTP)
 - Open Government Plan Version 3.0 (OSTPOGP3) Plain XML text | Styled
 - Increasing Access to the Results of Federally Funded Scientific Research (IARFFSR) Plain XML text | Styled
- 7. National Strategy for Information Sharing & Safeguarding (NSISS) Plain XML text | Styled
- 8. Digital Government Strategy (DGS) Plain XML text | Styled
- 9. Performance.gov Site (PerfGov) Plain XML text | Styled
 - Customer Service Focus Area (Customer Service Plans)
 - 1. Developing an Effective Customer Service Strategy for Government Agencies (CSSGA), HowTo.gov Plain XML text | Styled
 - 2. Department of the Commerce (DOC) Plain XML text | Styled
 - 3. Department of the Education (ED) Plain XML text | Styled
 - 4. Department of the Energy (DOE) Plain XML text | Styled
 - 5. Environmental Protection Agency (EPA) Plain XML text | Styled
 - 6. General Services Administration (GSA) Plain XML text | Styled
 - 7. Department of Homeland Security (DHS) Plain XML text | Styled
 - 8. Department of Housing and Urban Development (HUD) Plain XML text | Styled
 - 9. National Aeronautics and Space Administration (NASA) Plain XML text | Styled
 - 10. Small Business Administration (SBA) Plain XML text | Styled
 - 11. Department of the Treasury (Treas) Plain XML text | Styled
 - 12. U.S. AID Plain XML text | Styled
- 10. M-12-08 -- Principles for Federal Engagement in Standards Activities to Address National Priorities Plain XML text | Styled
- 11. Open Innovator's Toolkit (OIT), Aneesh Chopra, Federal CTO (Retired) Plain XML text | Styled
- 12. National Commission on Fiscal Responsibility and Reform (NCFRR)



StratML Stats



StratML Files Organized by Source Domains

Process Started: 2015-04-12T13:11:49-05:00

Files Processed: 3225
Files with no content: 0
Files with no <Source>: 16

Finished Processing: 2015-04-12T13:19:37-05:00

Time Elapsed: 468 seconds

Number of StratML Files: 3209

Last Processed: 2015-04-12T13:19:37-05:00



01 Communications StratML Portal



Home Statistics Door	monts Cotalog	CtuatEdit	VCI TEamer	DNIAOG	About	Dowtol	Classon	Contact [12]
Home Statistics Docu	ments Catalog	Strateon	ASLIFORMS	DNAUS	About	Portai	Glossary	Contact [!/]

StratML

StratML

This DNAOS-powered StratML portal, provides access to the largest number of strategic plan, as well as performance plan and report documents, as can be found in the

- StratML Documents
- StratML Document Catalog
- StratML Document AlphaCloud

sections, as well as confirmed through various pages of the StratML Portal Resources section.

Resources

The StratML Portal Resources section provides a range of related

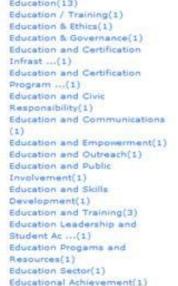
- · StratML Portal Statistics
- StratML Portal Document Indices
- StratML Portal Document GUID References
- StratML Standards, including:
 - StratML Document Forms
 - StratML Document Stylesheets
 - StratML Document Schema
 - StratML Document Cloud-Based Application Services
- StratML and StratML Portal Tools, including:
 - StratML Document Forms
 - · StratML Document Stylesheets
 - StratML Document Schema
 - StratML Document Cloud-Based Application Services
- StratML Portal Reference Links



MarkLogic StratML Query Prototype

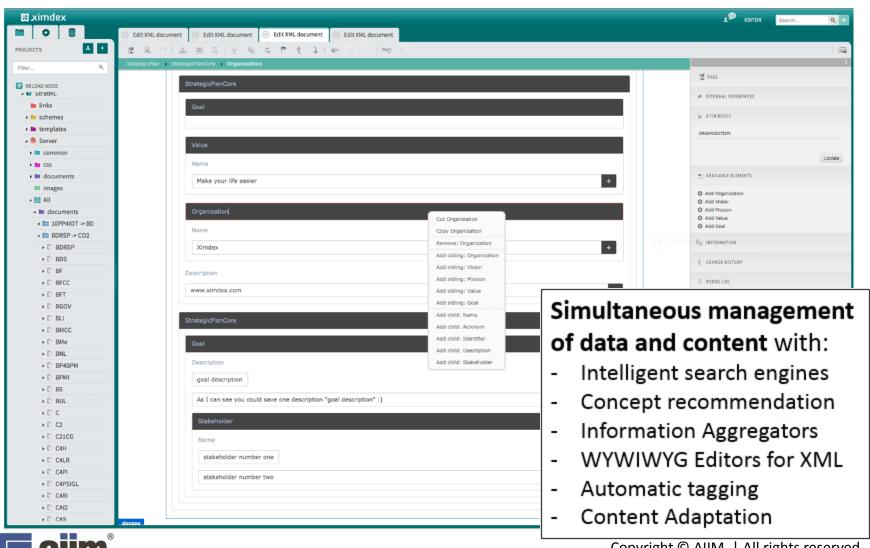


Full Text Vision Mission Organization Name Organization Acronym Goal Name Goal Description Goal Other Information Objective Name Education Objective Description Objective Other Information All Names All Descriptions All Other Information Search Search





Ximdex CMS





Tools, Apps & Services

StratML Tools, Applications & Services

Following is a tentative (draft) listing of tools, applications and services required to support the StratML standard, for discussion and editing by the StratML Committee.

- 1. Authoring/Editing -- to create and edit StratML documents
 - 1. Crowdsourcing -- to collaboratively author and edit StratML documents
- 2. Element Selection/UI Builders -- to enable users to select the elements they want to appear in their user interface (UI) to view, author and/or edit StratML files
- 3. Adapters/Converters/Transformers -- to import and export StratML documents from databases and document/content/records management systems
- 4. Query/Discovery Services -- to enable not only full-text but also faceted querying and discovery of discrete elements of StratML documents
 - 1. Discovery by Stakeholder names and/or descriptions
 - 2. Discovery by Goal & Objective names and/or descriptions
 - 3. Discovery by Value (principles) names and/or descriptions
- 5. Review/Commenting/Input/Feedback -- pushed &/or pulled, linked to discrete elements within StratML files by their identifiers, and available for presentation in context of the ExtratML documents themselves
- 6. Presentation/Display -- in multiple ways, however the viewer wishes to view StratML documents, including subsets of their elements
- 7. Analysis -- automated as well as human assisted
 - 1. Text Analysis -- to identify potential relationships between discrete elements within StratML files (not merely their full texts)
 - 2. Graphical Display -- to enable humans to more easily perceive and understand trends and relationships
- 8. **Relationship Identification & Verification & Description** to enable human beings to see and verify candidate relationships identified by automated services and to draft concise narrative descriptions of such relationships as well as to nominate such relationships not previously identified. Such services must make it easy to cite the identifiers of the related elements.
 - 1. Strategic Alignment -- to enable users to link elements of StratML files to each other (e.g., performance indicators to goals/objectives in other plans)
 - 2. Values Alignment / Verification -- to enable values to be linked to goals, objectives and performance indicators and to enable users to provide input and feedback questioning or verifying the conformance of results with values (Accountability Services)
- 9. Values Validation Services -- to analyze and report to stakeholders the degrees to which the goals, objectives and results of interest to them are consistent with their own values and validate the avowed values of the organizations establishing those goals and objectives
- Results Validation/Auditing Services -- to analyze and report to stakeholders the degrees to which the results of interest to them are being accurately measured and reported by the organizations establishing the relevant goals and objectives



More Tools, Apps & Services

- 11. Deadline Reminders -- notification of impending end dates for performance indictors
- 12. Mashups -- services to enable the combination of elements of different StratML documents for presentation as desired by users
- 13. Identifier Verification, Linkage, and Correction -- to determine when identifiers have (inadvertantly or maliciously) been misused and to enable verification and activation of linkages based upon identifiers used to establish relationships
- 14. Partnership Tools -- enable potential performance partners to easily identify each other and cross-reference their common and/or complementary objectives in each other's respective plans and reports (transformation of the advertising/marketing paradigm)
- 15. Conference Agenda Services -- enable conference organizers to document session objectives, stakeholders of the performer (speaker/presenter) and beneficiary (attendee) types, and desired results while also enabling participants to link conference objective to objectives in their personal performance plans as well as to form virtual partnerships with other participants before, during, and after each event (thereby alleviating the risk of frivolous, unproductive gatherings)
- 16. Value Chain Builders -- identification, documentation, and sequencing of inputs, input processing, outputs, and output processing required to achieved desired outcomes
- 17. Input & Processing Discovery & Procurement -- outsourcing of inputs and processing outside the scope of the organization's core competencies
- 18. Goal, Objective, Performance Indicator & Stakeholder Subscription Services -- automated notification of changes/updates to particular goals, objectives and/or performance indicators and/or of interest to particular stakeholder groups
- 19. **Document, Content, Records Management Services** -- enabling the linkage (strategic alignment), discovery and retrieval of documents/content/records based upon the strategic goals and objectives they support and vice versa (top-down & bottom-up)
- 20. Critical Mass, Rally, Bandwagon, Tipping Point Services -- to enable users to rally around, create networking "bandwagon" effects, establish critical mass and reach tipping points at which achievement of goals can be assured (pledges, contributions, referrals, challenges, etc.)
- 21. Replication & Redundancy Services to enable replication of StratML data across multiple hosts for resiliancy, redundancy for speed and survivability, and for specialized query discovery, access, presentation and analyses by various communities of interest/practice (association/virtual organizational portals and services)

If you have proposed additions or clarifications to this listing, please send them to Owen.Ambur@verizon.net



Are You In?

A Worldwide Web (Cloud) of Intentions, Stakeholders, and Results ...

Will you be easily recognized ... or missing in action ... in the Internet of People (IoP)?

Will your content be found ... or invisible ... in the *Strategic* Sematic Web?

Will your content be managed effectively ... to enable you to achieve the results you seek?



Additional Resources

- StratML Committee home page
 - http://www.aiim.org/Research-and-Publications/Standards/Committees/StratML
- AIIM's StratML community groups
 - Announcements
 - http://community.aiim.org/communities/communityhome?CommunityKey=4ca7249f-d463-4a9c-b657e807c6ff1261
 - Technical Discussions
 - http://community.aiim.org/communities/communityhome?communitykey=147ff660-fc0a-446d-ac0ce3f46f9f04c3&tab=groupdetails

